PRV – Call Center Key Wording Documents

Purpose:
The objective of this procedure is to ensure that every OnBase correspondence is key worded in a way that it can be easily located.

The team leader or designated Customer Service Representative (CSR) will obtain the necessary information and enter it as a keyword on the OnBase correspondence document. Provider and member information must be included in the key wording as this is what will be used when completing the Provider Inquiry look-up task.

Identification of Roles:
CSR, Team Lead, Trainer, Supervisor, Management

Performance Standards:
To be completed within 5 business days of receipt date.

Path of Business Procedure:

Step 1: Correspondence is scanned into OnBase client by Core Unit

Step 2: Key wording agent signs into OnBase Client and accesses
   a. Click on "Workflow", and choose "Life Cycle View" at the bottom of Workflow
   b. Select "Provider Svcs Pre Screening LC"
   c. Select "PRV01-Correspondence"
   d. Select Correspondence
      1. If display shows "Access Denied", another agent has this correspondence pull up on his/her computer. To move to the next correspondence, exit and select another correspondence.

Step 3: Determine correspondence target based on the following business units
   a. Provider Services Call Center: Go to Step 4
   b. Provider Enrollment: Go to Step 5
   c. Non-Provider Services business unit: Go to Step 6
   d. If document is indexed incorrectly, re-index to document type: Go to Step 7

Step 4: Call Center process
   a. Click on "Enter Keywords" under "Task" options
   b. Look for Provider/National Provider Identifier (NPI) # on claim
   c. Look for Member Identification (ID) # or Provider Name
      1. Enter Provider/NPI, Member ID # and click "Save"
      2. Screen will display, "Values on the Keywords E-form have been applied to the document"

    d. Click OK

    e. Highlight document key word and press "Done Processing" under tasks

Step 5: Document is routed to PRV02

Step 6: Enrollment process

    a. Select correspondence under "Task" option

    b. Click on "Enrollment Correspondence"

Step 7: Document is forwarded to enrollment to work

Step 8: Non-Provider Services business unit process

    a. Click "Reroute" under "Task" option to reroute document to the other department

Step 9: Re-route correspondence to the correct business unit

Step 10: Re-indexing process

    a. Choose "Reindex" task

    b. Click on "Enter Keywords" under "Task" options

    c. Look for Provider/NPI # on claim

          1. Enter Provider/NPI and click "Save"

          2. Screen will display "Values On the Keywords E-form have been applied to the document"

    d. Click OK tab to Re-index the document to the appropriate queue to be worked

    e. Re-index document by clicking on "Reindex" under "Task" option

        Select option from drop down box

Step 11: Document is forwarded to the correct specialist in Provider Services to be worked

Forms/Reports:
Check Request Form

RFP References:
6.4.2.3.c

Interfaces:
MMIS
OnBase
Providers
Unit Leads

Attachments:

Process Map

Attachment
IME Operational Procedures Requirements Flowchart

PRV - Call Center Key Wording Documents

Core Unit	Call Center CSR / Team Lead Keywording Agent

Correspondence is received and scanned into OnBase by the Core Unit
1

Key wording agent signs into OnBase Client and accesses PRV01
2

Determine target unit to process correspondence and route appropriately
3

Call Center process
4

Enrollment process
6

Non-Provider Services buiness unit process
8

Re-indexing process
10

Document is routed to PRV02
5

Document is routed Provider Enrollment
7

Re-route correspondence to correct unit
9

Document is forward to the correct specialist
11